



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

**Waiver of Account and Report of Administrator, Petition for Final Distribution and for Payment to Attorney for Ordinary Services**

<b>DOD: 8/6/10</b>		<p><b>JOYCE CERONSKY</b>, Spouse and Administrator with Full IAEA without bond, is Petitioner.</p> <p>Petitioner states she is the sole heir and waives account.</p> <p>I&amp;A: \$4,352.70 cash POH: \$4,352.70 cash</p> <p>Administrator (Statutory): Waives</p> <p>Attorney (Statutory): \$174.10</p> <p>Petitioner states she is the only heir at law and requests distribution of the property is 100% to her, Joyce Ceronsky.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. The I&amp;A indicates that the estate assets consist of death claim settlement funds; however, Petitioner does not allege that the settlement was community property. Therefore, the decedent's two sons and issue of a predeceased child may also be entitled to shares pursuant to Probate Code §6401 (intestate succession).</p> <p>If so, waivers of account would be needed from all heirs, and a revised distribution order would be needed.</p>	
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<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 10/23/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3 – Ceronsky</b></p>				

**First and Final Account and Report of Administrator and Petition for Its Settlement, for Allowance of Compensation to Administrator and Attorney for Ordinary Services and for Final Distribution**

<b>DOD: 9/16/13</b>		<b>CRAIG GAMMELL</b> , Nephew and Administrator with Full IAEA with bond of \$270,000.00, is Petitioner.  <b>Account period: 5/20/14 – 6/30/15</b> Accounting: \$479,241.65 Beginning POH: \$465,561.00 Ending POH: \$450,382.61 (cash)  Administrator (statutory): \$12,584.83  Attorney (statutory): \$12,584.83  Closing: \$2,500.00  Distribution pursuant to intestate succession: (See #1)  Ella Sift: 25% Loretta Deel: 25% Donald Gammel: 25% Robert Gammel: 25%	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Petitioner requests to distribute the estate to the decedent's four (4) living siblings in 25% shares; however, per Declaration filed 4/25/14, the Decedent also had a fifth sibling, Walter Gammel, who predeceased him. Court records from Estate of Walter Gammel 07CEPR00447 indicate that Walter Gammel had issue, Craig Gammel (Administrator herein) and Michael Gammel, who inherited Walter's 50% share of the instant real property.  Pursuant to Probate Code §240, this Decedent's estate should be distributed in five (5) shares of 20%, and Craig and Michael are entitled to their father's share, 10% each. Therefore, need amended petition and notice to all heirs, including Michael Gammel.  2. Petitioner states in the footnote on Page 3 that the \$6,250.08 credit included miscellaneous expenses incurred prior to issuance of Letters, and states he was able to recover some information and believes checks were written for ranch property expenses. The Court may require further clarification regarding who had access to the Decedent's account?  <u>SEE ADDITIONAL PAGE</u>	
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<b>Reviewed by:</b> skc				
<b>Reviewed on:</b> 10/23/15				
<b>Updates:</b> 10/26/15				
<b>Recommendation:</b>				
<b>File 4 – Gammel</b>				

## Page 2 – NEEDS/PROBLEMS/COMMENTS (Cont'd):

3. Schedule C, Expenses of Sale, indicates that a 4% commission on the sale of the real property was paid from the Decedent's 50% share, which would make the total commission 8%. A typical real estate commission is 5-6%. The Court may require clarification as to the high broker commission.
4. Fee base includes \$429.11 in "additional property received" during account period; however, this amount does not appear on any of the schedules, and no supplemental I&A was filed. Need clarification: What additional property was received?
5. Disbursements Schedule indicates four CourtCall appearance fees of \$116 each on 7/23/14, 11/11/14, 12/18/14, and 7/23/15. Local Rules updated 7/1/15 disallow CourtCall appearance fees as a cost of doing business and not reimbursable, so the \$116 charge for 7/23/15 may be disallowed.

Further, the CourtCall rate is \$86, and if set up less than two days in advance, an additional \$30 is charged (total \$116). Need clarification as to why the estate should bear the cost of the late scheduling fees, as all dates appear to have been known to the attorney far enough in advance to avoid the extra expense. The Court may also disallow this \$90.00.

Therefore, the Court may require the attorney to reimburse \$206.00 to the estate.

6. Need revised proposed order per Local Rules 7.1.1.F, 7.6.1. Note that monetary distributions should be stated in dollars and not as percentages of the estate.

## Probate Status Hearing RE: Proof of Increased Bond

		NEEDS/PROBLEMS/COMMENTS:  <u><b>OFF CALENDAR.</b></u> Additional bond filed.
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	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
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	Notice of Hrg	
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	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: KT
		Reviewed on: 10/23/15
		Updates:
		Recommendation:
		File 5 – Munsey

Attorney Cobb, Lee S.W. (for Casey S. Rogers – Trustee – Petitioner)  
 Petition to Settlement and Approve First Account and Report of Administration of the  
 Eugene M. and Evelyn I Ford Family Trust - Survivor's Trust; The Eugene M and Evelyn I Ford  
 Family Trust - Marital Trust; and the Eugene M. and Evelyn I. Forf Family Trust - Credit Trust

Eugene M. Ford DOD: 4/25/93		CASEY S. ROGERS, Trustee, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
Evelyn I. Ford DOD: 12/23/13			
		Account period: 12/23/13-12/31/14	<p><u>Minute Order 9/14/15:</u>          Ms. Gould reports that the related estate case (14CEPR00536) is in appeals; the opening brief was just filed last week so the appeal could go on for the next year. Mr. Cobb requests that the issue of ownership of the Tollhouse property be reserved and that the accounting be approved. The matter is continued in order for Mr. Keeler to be present.</p> <p><u>Note:</u> Since the last hearing, Mr. Rogers has filed two requests for pretrial discovery. Nothing further appears to have been filed in connection with this petition.</p> <p><u>Note:</u> It does not appear trial has been set in either this matter or the matter at Page B.</p> <p>1. Need order. See Local Rule 7.1.1.F.</p>
		Survivor's Trust Accounting: \$2,447,327.99	
		Survivor's Trust Beginning POH: \$2,423,730.79	
		Survivor's Trust Ending POH: \$ 258,261.60	
Cont. from 081015, 091415		Marital Trust Accounting: \$1,793,172.79	
	Aff.Sub.Wit.	Marital Trust Beginning POH: \$1,461,938.69	
✓	Verified	Marital Trust Ending POH: \$1,307,834.52	
	Inventory	Credit Trust Accounting: \$1,814,286.07	
	PTC	Credit Trust Beginning POH: \$1,800,300.00	
	Not.Cred.	Credit Trust Ending POH: \$0	
✓	Notice of Hrg	Petitioner states upon the death of Eugene M. Ford on 4/25/93, the Family Trust was divided into three separate subtrusts: The Survivor's Trust, the Marital Trust, and the Credit Trust. Evelyn I. ford executed various amendments and other testamentary documents thereafter. Following her death, Susan Frantzich produced a handwritten document dated 3/6/13.	
✓	Aff.Mail	On or about 9/22/14, Beneficiary Susan Frantzich filed an Amended Petition for Determination of Validity of Trust Amendment, which disputes the distribution provisions of the Survivor's Trust and the Marital Trust. The Frantzich Petition is currently on hold pending a determination of the appeal: On 8/20/14, the Will, First Codicil, Second Codicil, and Third Codicil were admitted to probate and Petitioner Casey Scott Rogers was appointed as Executor by order of this Court in 14CEPR00536. Petitioner believes there are no assets subject to administration in the estate. On or about 11/4/14, Ms. Frantzich filed a notice of Appeal which is currently pending in the Fifth District Court of Appeal in F070917.	
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✓	Objections		
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	FTB Notice		
<b>SEE ADDITIONAL PAGES</b>			

**Petitioner states** this petition is reasonably necessary for the protection of the interests of both the trustee and the beneficiaries of each subtrust given the ongoing disputes and/or objections related to the administration of each trust as raised by Ms. Frantzich. By means of this petition, the trustee seeks timely determination of all matters presented in this account.

Petitioner provides first accounts for each of the three subtrusts for account period 12/23/13 through 12/31/14 and describes misc. matters:

- **Subtrust Funding Plan.** Upon the death of Eugene M. Ford, the assets of the Family Trust were divided and allocated among the three subtrusts; namely, the Survivor's Trust, the Marital Trust, and the Credit Trust. Although the subtrust funding plan (Exhibit S) provided for allocation of the various real properties among the subtrusts, Evelyn I. Ford inadvertently failed to change record title to the various assets in a manner consistent with the subtrust funding plan. Rather, title to various assets remained in the Family Trust. Notwithstanding the failure to change title, Petitioner believes that at all relevant times, Evelyn I. Ford administered the subtrusts in a manner consistent with the allocation of assets provided in the subtrust funding plan, including the filing of taxes through the years. Petitioner has continued to administer the assets of each trust and has prepared the accounting for each trust consistent with the subtrust funding plan.
- **Short Sale of Beach House.** Pursuant to the Subtrust Funding Plan, the Beach House in Pebble Beach, CA, was allocated and distributed 50% to the Survivor's Trust, 7.64% to the Marital Trust, and 42.36% to the Credit Trust. During her lifetime, Evelyn I. Ford obtained a reverse mortgage secured by the beach house. Pursuant to its terms, the outstanding principal and accrued but unpaid interest became due immediately upon her death. As of 1/31/14, the outstanding balance on the reverse mortgage was \$5,172,316.00. The beach house was ultimately sold through a short sale for a total of \$4,250,000.00. After consulting with the accountant, Petitioner is informed and believes that the short sale did not result in any federal and state income taxes with respect to the interest owned by the Survivors and Marital Trusts; however, the sale resulted in federal and state income taxes in the sum of \$399,846.00 with respect to the Credit Trust. The Credit Trust is insolvent such that it will not be able to pay any of the taxes due and owing. Petitioner is in the process of preparing federal and state fiduciary income tax returns consistent with that set forth above.
- **Trustee Compensation In Regard to Short Sale.** Petitioner states he expended considerable time and effort to secure the lender's consent to the sale, which included paperwork, following up on status, and other communications with the lender. Petitioner is a licensed real estate agent, experienced in short sales, and the services provided were of the type typically performed by the listing agent. In recognition of this, the listing agent and broker offered to and did pay Petitioner a short sale processing fee of \$27,597.50 (1% of the total commission payable). The processing fee is the standard and customary fee paid in these types of transactions to a referring agent, particularly where the referring agent spent considerable time navigating the short sale process, and was only paid because Petitioner is a licensed real estate agent. It did not result in any increased costs of sale given that the commission was already due and payable to Coldwell Banker as the agent and broker. Under the terms of each trust, the trustee is entitled to reasonable compensation for services rendered. Petitioner therefore respectfully requests the Court authorize and approve the payment of the short sale processing fee of \$27,597.50 as reasonable compensation for services rendered by Petitioner in connection with the short sale of the beach house.

**Petitioner requests this Court to order that:**

1. The Petition to Settle and Approve First Account and Report of Administration of the three subtrusts be settled, allowed and approved as filed;
2. The first account of the Survivor's Trust be settled, allowed, and approved, and all acts and transactions of Petitioner as set forth herein or relating to matters set forth herein be ratified, confirmed and approved;
3. The first account of the Marital Trust be settled, allowed, and approved, and all acts and transactions of Petitioner as set forth herein or relating to matters set forth herein be ratified, confirmed and approved;
4. The first account of the Credit Trust be settled, allowed, and approved, and all acts and transactions of Petitioner as set forth herein or relating to matters set forth herein be ratified, confirmed and approved;
5. Casey S. Rogers, as trustee, is authorized to accept the short sale processing fee of \$27,597.50 as his reasonable compensation for services rendered as trustee in connection with the short sale of the beach house; and
6. Such further order be made as this Court may deem proper.

**Objection filed 8/7/15 by Susan Ford Frantzich states** the accounts for the three subtrusts do not provide the detail required by Probate Code §1061 et seq. A comparison of the schedules shows incompatible figures for purported transactions between the subtrusts. The Property on Hand shown for the Marital Trust shows property to which title is presently undetermined based on Evelyn Ford's handwritten document. The compensation received related to the sale of a trust asset is inappropriate and a breach of the trustee's fiduciary duties. See Objection for specific discussion.

**Objector requests the Court order the following:**

1. Deny the trustee's prayer for approval and settlement of his first account and report;
2. Order the trustee to properly and fully report and account;
3. Award Objectors' reasonable attorneys' fees and costs by determining that the trustee's first account has been filed and submitted in bad faith; and
4. For such other and further relief as the Court deems proper.

**Petitioner filed Reply in Support of Petition on 9/10/15. Petitioner states** the objection of Frantzich is made in bad faith and is further evidence of her intent to obstruct and delay the orderly administration of the trust estate.

**7B Eugene & Evelyn Ford Family Trust**

Case No. 14CEPR00485

Atty Keeler, William J. (for Susan Ford Frantzich – Beneficiary – Petitioner)

Atty Chielpegian, Mark E. (for Casey S. Rogers – Trustee – Respondent)

**Amended Petition for Determination of Validity of Trust Amendment**

Eugene M. Ford DOD: 4-25-93		SUSAN FORD FRANTZICH, Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Evelyn I. Ford DOD: 12-23-13			
Cont. from 110614, 111714, 091415		Petitioner states she is the daughter of decedents Eugene M. Ford and Evelyn Irene Ford and is a beneficiary of the <b>Eugene M. and Evelyn I. Ford Family Trust dated 1-7-91. (Exhibit A)</b>	<u><b>SEE ADDITIONAL PAGES</b></u>  <b>Minute Order 9/14/15:</b> Ms. Gould reports that the related estate case (14CEPR00536) is in appeals; the opening brief was just filed last week so the appeal could go on for the next year. Mr. Cobb requests that the issue of ownership of the Tollhouse property be reserved and that the accounting be approved. The matter is continued in order for Mr. Keeler to be present.  <b>Note:</b> Since the last hearing, Mr. Rogers has filed two requests for pretrial discovery. Nothing further appears to have been filed in connection with this petition.  <b>Note:</b> It does not appear trial has been set in either this matter or the matter at Page A.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	The Fords had three children: Nancy Lee Ford of Cambria, CA, Susan Jean Frantzich of Clovis, CA, and Patricia Elaine Coffman of Sanger, CA. The original trust named Nancy, Susan, and Patricia as successor co-trustees.	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Petitioner states the trust property includes, <i>inter alia</i> , real property known as the Quail Oaks Ranch. Among other provisions, the trustee had the power to "apportion and allocate assets of the trust estate" at Section 8.08A. The trust also gave the surviving spouse the power to "amend, revoke, or terminate" the Survivor's Trust at Section 2.03(D).	
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			Reviewed by: skc
			Reviewed on: 10/23/15
			Updates:
			Recommendation:
			File 7B – Ford

7B

**Page 2****Petitioner states:**

- On 12-1-92, Mr. and Mrs. Ford signed the 1<sup>st</sup> Amendment, which amended the trust to name A. Douglas Flint, in the alternative Michael S. Pistoresi, as successor trustees, among other changes. (Exhibit B)
- On 4-25-93, Mr. Ford died and Mrs. Ford became the sole trustee.
- On 6-21-96, Mrs. Ford signed the 2<sup>nd</sup> Amendment, which amended the trust to appoint the Survivor's Trust to her then-living daughters. (Exhibit C)
- On 1-16-03, Mrs. Ford signed the 3<sup>rd</sup> Amendment, revoking the 1<sup>st</sup> and 2<sup>nd</sup> Amendments and amending the trust to name Nancy, Susan and Patricia as successor co-trustees. (Exhibit D)
- On 6-12-03, Mrs. Ford signed the 4<sup>th</sup> Amendment, revoking the 3<sup>rd</sup> Amendment and appointing the Survivor's Trust to her then-living daughters. The 4<sup>th</sup> Amendment also amended the trust to name Robert G. Carter as successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit E)
- On 10-24-03, Mrs. Ford signed the 5<sup>th</sup> Amendment, appointing \$12,500 each to Ronald McKenzie, Joanne Stanion, and Samantha Cole. (Exhibit F)
- On 7-7-09, Mrs. Ford signed the 6<sup>th</sup> Amendment, revoking all previous amendments and appointing Casey Scott Rogers as successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit G)
- On 3-29-12, Mrs. Ford signed "a trust amendment" naming Petitioner Susan Frantzich as successor trustee. (Exhibit H)
- On 5-10-12, Mrs. Ford signed the 8<sup>th</sup> Amendment, revoking all prior amendments and appointing James M. Bell as successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit I)
- On 3-6-13, Mrs. Ford signed a document stating: "Upon my death, my daughter Susan Ford Frantzich will inherit the Quail Oaks Ranch 'barn compound,' and adjacent 40 acres." (Exhibit J)
- On 3-14-13, Mrs. Ford signed the 9<sup>th</sup> Amendment, purportedly revoking the 1<sup>st</sup> through 8<sup>th</sup> Amendments, and purportedly appointing Casey Scott Rogers as successor trustee, with James M. Bell as next successor trustee, then Nancy, Susan and Patricia as successor co-trustees. (Exhibit K)

**SEE ADDITIONAL PAGES**

**Page 3**

**Petitioner states** she has filed a Petition for Probate in this matter to ensure the Court has the power to enforce Mrs. Ford's intent as expressed in Exhibit J whether it is determined to have been expressed as a codicil or a trust instrument.

Petitioner states Mrs. Ford had the power to amend the Survivor's Trust, and frequently exercised that power before her death. She also had the power to allocate the assets of the trust, including the Quail Oaks Ranch property. Mrs. Ford handwrote the document to leave the Quail Oaks Ranch property "barn compound" and adjacent 40 acres to Petitioner. She had her caregiver, Hilda Ceballos, witness the document, showing the gravity and seriousness of her intent to make a change to the disposition of her estate plan. She satisfied the requirements of the trust for amendment by delivering a copy to herself as sole trustee. Petitioner requests that this Court order that the 3-6-13 document is a valid trust amendment.

**Petitioner requests that the Court order the following:**

- 1. Declare the document signed on 6-3-13 is a valid trust amendment;**
- 2. For costs herein; and**
- 3. For such other orders as the Court may deem proper.**

**Response filed 10-8-14 by Casey S. Rogers, Trustee, states** the handwritten document does not constitute a valid amendment to the Survivor's Trust. Mr. Rogers believes he is authorized and directed to oppose the petition, as it has been informally raised whether his opposition would constitute a breach of his fiduciary duties (impartiality) to petitioner as a beneficiary.

In light of the conflict issue raised by Petitioner, Mr. Rogers intends to file a separate petition for instructions as to whether he is authorized and empowered to object to and oppose this petition.

**Respondent requests this Court order that:**

- 1. The petition be continued pending the determination of Respondent's anticipated petition for instructions; and**
- 2. Such further order be made as this Court may deem proper.**

**Note: Respondent's Petition for Instructions filed 10-10-14 is set for hearing on 11-17-14.**

**Page 4**

**NEEDS/PROBLEMS/COMMENTS:**

**Note:** The verification is signed by Petitioner's attorney on her behalf.

1. **Need verification of correct service list.** At #4 of the petition, Petitioner provides names and addresses of those entitled to notice. However, the Notice of Hearing filed 9-29-14 indicates mailing to some people at different addresses than were listed in the petition. Need clarification regarding notice to:
  - Petitioner Susan Frantzich's address: Tollhouse Road or Sample Road?
  - Brandon Rogers: Woodrow Avenue or Saginaw Way?(Also note: Why was notice sent "C/O" ? Direct notice is required per Cal. Rules of Court 7.51.)
  - Casey Scott Rogers: Woodrow Avenue or Lane Avenue?
2. **Need order.**



# 13 Brandon Casner, Matthew Casner (GUARD/P) Case No. 15CEPR00641

Petitioner Mcginnis, Angela (Pro Per – Cousin – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			<u>Minute Order 8/31/15:</u>
			Matter is continued to 11/2/15 for proof that a termination of guardianship has been filed in Tulare County.
			<u>As of 10/23/15, nothing further has been filed. The following issue remains noted:</u>
			1. According to the Court Investigator's report, the minors are currently under a guardianship in Tulare County.
			Therefore, need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on:
			- Cindy Marqheim (Guardian)
			Reviewed by: skc
			Reviewed on: 10/23/15
			Updates:
			Recommendation:
			File 13 – Casner

Cont. from 083115		
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<input type="checkbox"/>	Inventory	
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✓	Letters	
✓	Duties/Supp	
<input type="checkbox"/>	Objections	
<input type="checkbox"/>	Video Receipt	
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✓	Clearances	
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## Petition for Probate of Will and for Letters of Administration with Will Annexed.

## Authorization to Administrator under the Independent Administration of Estates Act

DOD: 05/23/15		<b>ROBERT L. LUTZ</b> , son, is Petitioner, and requests appointment as Administrator with Will Annexed without bond.  All heirs waive bond.  Full IAEA – OK  Will dated 12/09/05  Residence: Fresno Publication: The Business Journal	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>CONTINUED FROM 09/28/15</u>  <b>Note:</b> Waiver of Bond by Helen Sprengel was signed on behalf of Ms. Sprengel by Kaye Whitney, her attorney in fact.  <b>Note:</b> If the petition is granted status hearings will be set as follows:  <ul style="list-style-type: none"> <li>• <b>Monday, 04/02/16 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u></li> <li>• <b>Monday, 02/06/17 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.</li> </ul> Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.	
Cont. from 092815				
<input type="checkbox"/>	Aff.Sub.Wit.			s/p
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<input type="checkbox"/>	Inventory			
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<input checked="" type="checkbox"/>	Aff.Mail			w/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.		<b>Estimated Value of the Estate:</b> Personal property - \$ 1,000.00 Real property - 275,000.00 <b>Total - \$276,000.00</b>  Probate Referee: <b>RICK SMITH</b>	
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting		<b>Reviewed by:</b> JF <b>Reviewed on:</b> 10/23/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 16 - Lutz</b>	
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Petitioner: Marcelina Cedillo (pro per)

## Petition for Appointment of Guardian of the Person

		<b>MARCELINA A. CEDILLO</b> , paternal grandmother, is petitioner.  Please see petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Notice of Hearing.  2. Need proof of personal service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Jessica Medina (mother)  3. Need proof of service of the Notice of Hearing along with a copy of the petition or Consent and Waiver of Notice or Declaration of Due Diligence on: a. Robert Valdez (paternal grandfather) b. Maternal grandfather	
<b>Cont. from</b>				
	<b>Aff.Sub.Wit.</b>			
✓	<b>Verified</b>			
	<b>Inventory</b>			
	<b>PTC</b>			
	<b>Not.Cred.</b>			
	<b>Notice of Hrg</b>			X
	<b>Aff.Mail</b>			X
	<b>Aff.Pub.</b>			
	<b>Sp.Ntc.</b>			
	<b>Pers.Serv.</b>	X		
✓	<b>Conf. Screen</b>			
✓	<b>Letters</b>			
✓	<b>Duties/Supp</b>			
	<b>Objections</b>			
	<b>Video Receipt</b>			
	<b>CI Report</b>	X		
	<b>9202</b>			
✓	<b>Order</b>			
	<b>Aff. Posting</b>			
	<b>Status Rpt</b>			
✓	<b>UCCJEA</b>			
	<b>Citation</b>			
	<b>FTB Notice</b>			
<b>Reviewed by:</b> KT				
<b>Reviewed on:</b> 10/23/15				
<b>Updates:</b>				
<b>Recommendation:</b>				
<b>File 18 – Valdez</b>				

<b>DOD: 6/2/11</b>		<b>ELIZABETH CORRALES, VERONICA BERMUDEZ, BARBARA SANCHEZ, and LOUANN GARCIA</b> , Daughters, are Petitioners.  40 days since DOD  No other proceedings  I&A: \$45,000.00 (real property located at 455 W. Spruce in Fresno)  Will dated 2/22/93 devises the entire estate to Petitioners.  Petitioners request Court determination that the decedent's 100% interest in the real property passes to them pursuant to the Decedent's will.	<b>NEEDS/PROBLEMS/COMMENTS:</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input checked="" type="checkbox"/>	<b>Inventory</b>			
<input type="checkbox"/>	<b>PTC</b>			
<input type="checkbox"/>	<b>Not.Cred.</b>			
<input type="checkbox"/>	<b>Notice of Hrg</b>			
<input type="checkbox"/>	<b>Aff.Mail</b>			
<input type="checkbox"/>	<b>Aff.Pub.</b>			
<input type="checkbox"/>	<b>Sp.Ntc.</b>			
<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input type="checkbox"/>	<b>Letters</b>			
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input type="checkbox"/>	<b>9202</b>			
<input checked="" type="checkbox"/>	<b>Order</b>			
<input type="checkbox"/>	<b>Aff. Posting</b>			
<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input type="checkbox"/>	<b>FTB Notice</b>			

<b>Reviewed by:</b> skc
<b>Reviewed on:</b> 10/26/15
<b>Updates:</b>
<b>Recommendation:</b> SUBMITTED
<b>File 22 – Corrales</b>

## Petition to Determine Succession to Real Property (Prob. Code §13150)

<b>DOD: 8/1/15</b>		<b>JACKIE EILEEN LEE</b> , Daughter, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		40 Days since DOD	<u><b>SEE ADDITIONAL PAGES</b></u>
		No other proceedings	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input checked="" type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	w/o	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>	x	
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 10/26/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 23 – Lee</b>

1. This petition was filed with a fee waiver. If assets are distributed pursuant to this petition, the filing fee of \$435.00 will be due prior to distribution.
2. Petition states at #9a(2) that the decedent was not survived by a spouse, but does not state whether the decedent was divorced or never married, or whether the spouse is deceased. If deceased, need date of death per Local Rule 7.1.1.D.
3. Need date of death of deceased son Douglas Arnold Lee per Local Rule 7.1.1.D.
4. The I&A includes cash, real property, and two vehicles. Attachment #11 appears to only request that the real property pass to Petitioner pursuant to the will. However, this leaves the cash bequests and vehicles outstanding. In this type of summary proceeding, all successors in interest must petition together for determination of the assets they are entitled to, and determination is made in one order. Assets cannot be left outstanding.

Therefore, an amended petition together with Michael Lee, Todd Lee, Willie Lee, Jr., Billy Lee, and Edward Lee may be necessary.

Alternatively, the Court may accept written receipts from the above people for their \$20 bequests.

5. Also, per above, need clarification: Is Petitioner requesting that the vehicles pass to her also?
6. Need clarification: The will devises \$20.00 to "Todd Lee." Petitioner lists a "Matthew Todd Lee" at #14. Is this the same person?
7. Need clarification: The will devises \$20.00 to "Billy Lee." Petitioner lists "Billy Lee, Jr." at #14. Is this the same person?
8. Petitioner states the addresses of the following relatives, one of whom is an heir, are unknown:
  - Billy Lee, Jr.
  - Bertha Louise Lee

As noted above, the Court may require all heirs to participate in the petition, or may require a receipt from Billy Lee, and may require notice to Billy Lee and Bertha Louise Lee.

9. Need order (Form DE-315) per Local Rule 7.1.1.F.